

CCTO Onboarding Reference

COVID-19 Community Team Outreach

As you begin using the CCTO Tool for the first time, keep the following in mind:

Logging In

Navigate to the [CCTO Tool](#) and enter your login information.

- If you have an email ending in **dhhs.gov**, log in using your current credentials.
- If you do not have a county or other email, the format of your login will be **YOURNCIDUSERNAME@ncid.gov**.

If you experience issues logging in, try opening the Tool in an incognito window or a new browser (e.g., Chrome, Internet Explorer) where you are not already signed in. Check with [your NCID Administrator](#) if you are unsure or continue to experience issues.

Set Your Time Zone

It is important to set your time zone accurately to effectively manage your Activities in the CCTO tool.

1. Click the gear icon in the top right corner.
2. Select "Personalization Settings."
3. Under "Time Zone," select (GMT -05:00) Eastern Time.
4. Click "OK" to save.

1 Gear Icon

2 Personalization

3 Time Zone

4 OK

Viewing Your Contacts

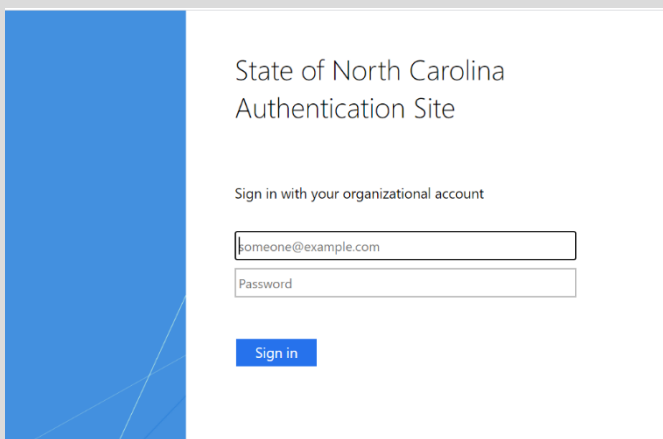
To review the contacts currently assigned to you, you can visit the Contacts Tab, drop it down, and click "My Active Contacts."

1. Visit the Contacts tab.
2. Click the arrow ▼ next to "Active Contacts."
3. To see your contacts, click "My Active Contacts" by selecting from the dropdown list of views.

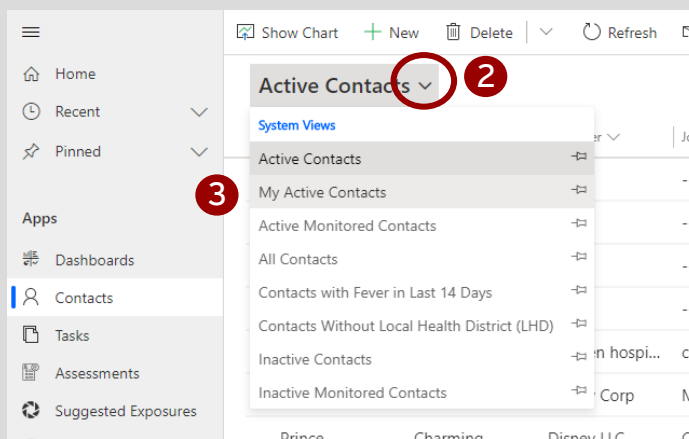
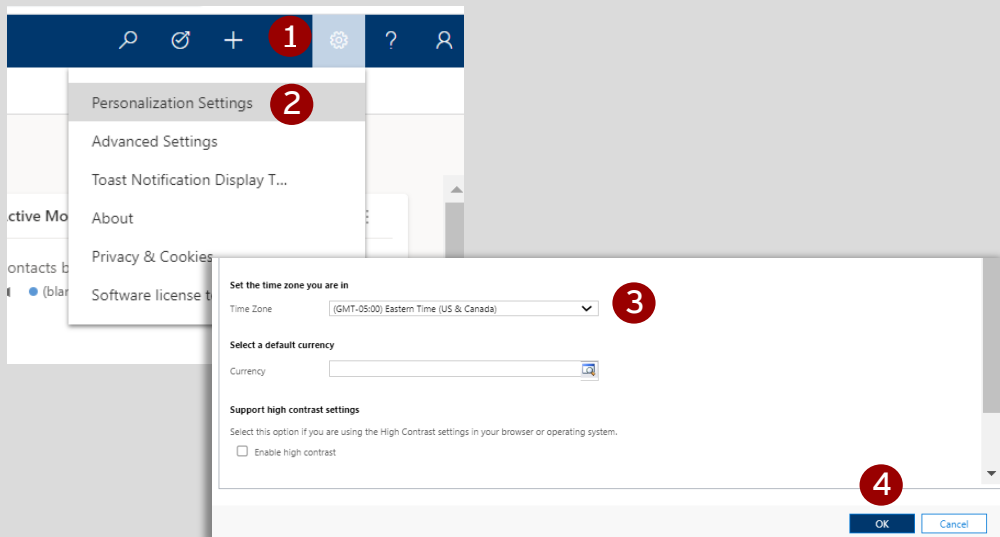
1 Contacts Tab

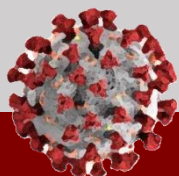
2 Active Contacts

3 My Active Contacts



If you experience issues, try logging in from a new internet browser before contacting your IT administrator.





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After you have saved your contact, you can assign and begin monitoring from their profile.

Viewing Your Appointments & Tasks in "Activities"

To review all appointments, tasks, and phone calls that have been created and assigned to you, visit the **Activities Tab**. This is done by clicking the Activities tab on the left-hand side of any screen.

Activities Tab

This tab will default to showing you a list of your open items, and you can view each in detail by clicking on it. **Please note that this list will not account for any needed appointments, tasks, or phone calls that you have not yet created.**

Due	Activity Type	Subject	Regarding	Priority
	Phone Call	Call to gather info	MSFT TEST	Normal
	Appointment	5/29-6/4 Monitoring Needed	Testing MonitoringField	Normal
	Task	5/29 Field Visit Required	Bill Testuser1	Normal
	Phone Call	Phone Testing	Bill Testuser1	Normal
	Appointment	5/26-5/31 Monitoring Needed	DONOTEDITCharlie Brown	Normal
	Appointment	5/29-6/1 Testing	Bill Testuser1	Normal
	Appointment	5/29-6/4 Monitoring Needed	Testing MonitoringField	Normal
	Appointment	5/29-6/4 Monitoring Needed	Testing MonitoringField	Normal
	Appointment	5/29-6/4 Monitoring Needed	Testing MonitoringField	Normal
	Appointment	5/29-6/4 Monitoring Needed	Testing MonitoringField	Normal

Viewing Your Contacts' Assessments in the Assessment Tab

Assessments are the record of daily monitoring for symptom changes and resource needs. The Assessments Tab pulls all assessments from individual contact profile. Each contact should have one assessment for each day of monitoring completed by phone, email, or text.

1. Click "Assessments" in the left-hand sidebar.
2. Click the arrow next to "Active Assessments."
3. Select "Assessments from Contacts I Own" to view only assessment responses from your contacts. You can interact with an assessment by clicking on it.
4. Note that the column headers in this tab reflect assessment responses to opt-in/opt-out, symptoms, and resource needs.
5. You may also filter this tab by "Resource View for Contacts I Own" or "Symptom View for Contacts I Own" to track needs and symptoms.

System Views	Assessment	Agreement	Ok for LHD to follow u...	Access to
Active Assessments	Initial	---	---	No
All Resource View	Initial	---	---	---
All Symptom View	Initial	---	---	---
Assessment Details	Initial	Yes, I agree to...	Yes	Yes
Assessments from Contacts I Own	Initial	Yes, I agree to...	---	---
Completed Assessments	Initial	Yes, I agree to...	---	---
Inactive Assessments	Initial	Yes, I agree to...	---	---
Resource View for Contacts I Own	Initial	---	---	---
Symptom View for Contacts I Own	Initial	Yes, I agree to...	---	---

Auto #	Source Contact	Assessment	Agreement	Ok for LHD to follow u...	Access to P...	Can you ta...
A-0000001020	Dan Blake	Initial	---	---	---	---
A-0000001035	Bill Testuser1	Initial	Yes, I agree to...	---	---	---
A-0000001036	Bill Testuser1	Monitoring	Yes, I agree to...	---	---	---
A-0000001037	Erika Monkey	Initial	Yes, I agree to...	---	---	---

System Views	Assessment	Agreement	Ok for LHD to follow u...	Access to
Active Assessments	Initial	---	---	No
All Resource View	Initial	---	---	---
All Symptom View	Initial	---	---	---
Assessment Details	Initial	Yes, I agree to...	Yes	Yes
Assessments from Contacts I Own	Initial	Yes, I agree to...	---	---
Completed Assessments	Initial	Yes, I agree to...	---	---
Inactive Assessments	Initial	Yes, I agree to...	---	---
Resource View for Contacts I Own	Initial	---	---	---
Symptom View for Contacts I Own	Initial	Yes, I agree to...	---	---

CURRENT ISSUE WITH ASSESSMENT DATES:

If a contact's response to the "Agreement" field is left blank (indicated by "---" in this column in the Assessments Tab) in either a digital assessment that did not receive a response or in a manual assessment, the "Last Assessment Date" field on their profile will not populate when the contact resumes their assessment. To populate this date, you can choose "No. I do not want to participate" for digital assessments that weren't completed, and "Yes, I agree to participate" for any assessments you input during phone calls with a contact. This issue will be fixed in a later software version.

"Agreement" field within a manual assessment

Details	
Assessment Type	Initial
Agreement	Yes, I agree to participate.
Agreement/Disagreement Date	

1. Assessments Tab
2. Active Assessments
3. Asmts. from Contacts I Own
4. Column Headers
5. Resource/Symptom Views